QUICK REFERENCE GUIDE

MANAGERS

SmartRoom™

GETTING STARTED

To install and use the application, you will need:

- ✓ An Internet Connection
- ✓ An Active SmartRoom Subscription
- ✓ A valid login to SmartRoom

CONFIGURE YOUR SMARTROOM

1. From the left menu, select Settings > Configuration
2. Set up advanced (optional) settings for your room
3. Available settings are:

GENERAL SMARTROOM SETTINGS:

- **Friendly Name -** Used to identify your SmartRoom throughout the site.
- **Enable Access Agreements -** Displays an Access Agreement to users after log in based on the settings under Settings > Access Agreement.
- **Login Expiry in Minutes -** User's session will automatically terminate after this amount of time (in minutes).
- **Allow Mobile App Access -** Allows for users to access SmartRoom through the mobile app if enabled.
- **Enable Split View -** If enabled this will be the default content view setting for the SmartRoom. Users can disable under their profile setting.
- **Landing Page -** Select the SmartRoom's default for users to be taken to the content or dashboard page after login.
- **Allow SmartDrive Access -** Used to enable SmartDrive for "All Users", SmartRoom Managers "SRM Only", or no Users "No Access"

ALERTS:

- **Enable Alerts -** If enabled SRMs or Users can configure alerts based on the below options
  - o Allow **Managers** to Manage Alerts
  - o Allow **Non-Managers** to Create Personal Alert
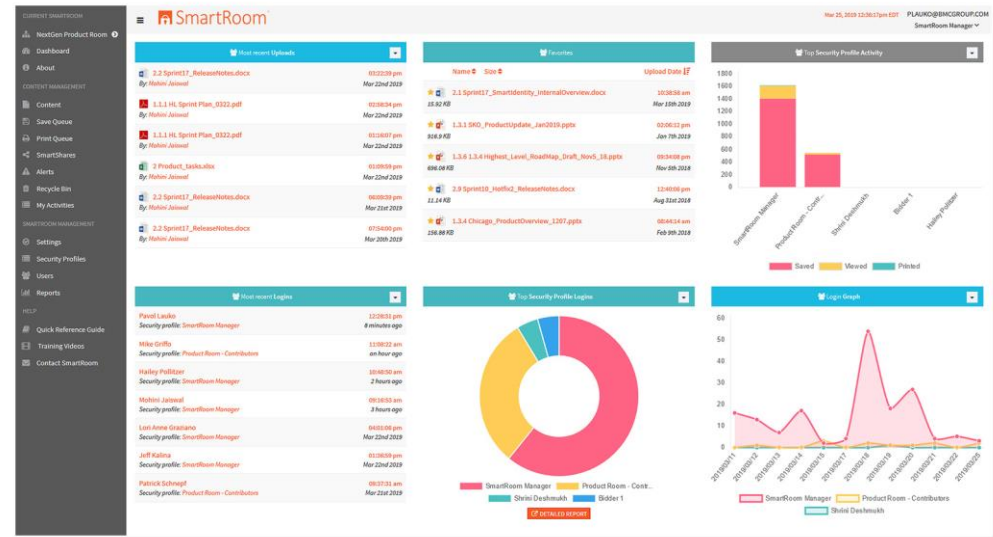
CONTENT SETTINGS

- **Enable File and Folder Numbering -** Used to include numbers as a prefix for folders and/or files in the main content view.
- **Show Names/Numbers in Saved Files/Folder -** Used to show or hide names and/or numbers when saving content using save queue. Often used when file paths exceed Microsoft's 255 character limitation.
- **Zero Based Numbering -** Used to display "0" as the initial number for the index structure. If disabled, index structure will start with "1".
- **Enable Gap Numbering -** Index display for security profiles that have folders denied to them will not reorder but will show a "gap" in the sections they do not have access to.
- **Enable File and Folder Counts -** Used to display the file and folder counts to the right of the folder. If disabled, the counts will display as 0.
- **Enable Document Versioning -** Allows multiple versions to be uploaded, managed, and viewed.
  - o **Auto Delete Previous Versions**: If the above is enabled then there will be an option to delete the previous versions.
- **Enable Staging -** Provides an additional layer of security access (content stages) to be set above the standard V/M/S/P rights of the security profile.
- **Hide Upload Date -** If enabled the Upload Date and Revision Date will be hidden for Non-SRMs in: Export Index Structure, Alerts, Split View column, Properties

CONFIGURE YOUR SMARTROOM

VIEW/SAVE SETTINGS:

- **Allow Bulk Save** - If disabled, Users will not be able to select the root folder, OR multi-select content and add to save queue or download.

- **Enable HTML Viewer -** Allows supported file types (.PDF, .Doc, .XLS, .PPT) to be viewed in web browser

- **Enable Office 365 -** Allows office documents to be opened and/or edited directly through MS Office.

- **Enable SmartLock -** Allows remote detonation of locally saved files after a specified time period. Use the additional settings to further control access of SmartLock files.

- **Advanced** View / Save Settings:

  o Use advance settings to further define your view and save requirements for Word, Excel, PowerPoint, PDF and non-Office files

QUESTIONS & ANSWERS

- **Enable Q&A** - If enabled, the "Q&A" module within Smart Room provides an automated and integrated approach to managing questions and answers within the data room, creating a simple, streamlined, and more secure process.

  For more information or to access our detailed user guide for Q&A, please contact your project manager.
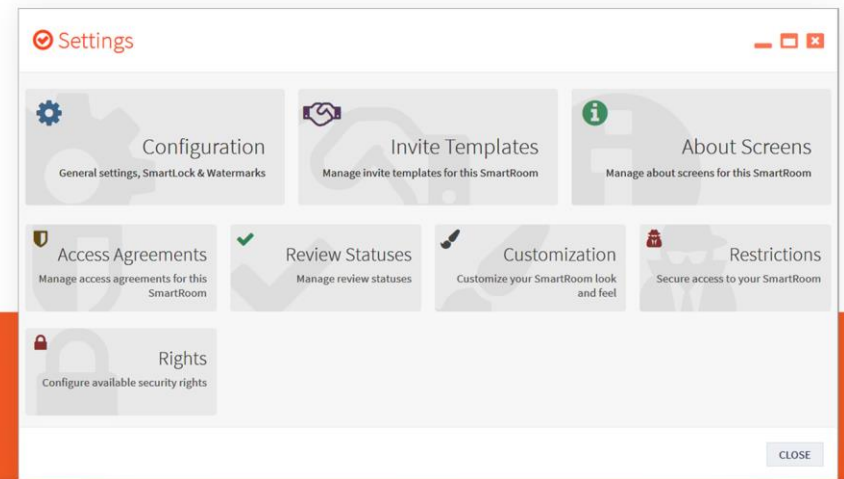
EMAIL CONFIGURATION:

- **User Invites -** Used to set the email address the SmartRoom invitations will come from. Either enable the SmartRoom Default or select a SRM from the dropdown.

- **Instant Alerts / Regular Alerts -** Used to set the email address SmartRoom Alerts will come from. Either enable the SmartRoom Default or select a SRM from the dropdown.

- **Email Upload Settings -** Used to create rules allowing content providers or clients to send emails with attachments directly into a specified SmartRoom folder. SRMs or users with upload rights can also forward relevant emails and leverage SmartRoom to store, share, and track document access. Once enabled, there is an online help section at the question mark above the "Add Rule" button `ADD RULE`

- **Enable Watermarks -** Stamps a customizable watermark image on the PDF version of supported docs. Use advanced settings to further define when to use watermarks.

- **Enable Localization -** Used to set local time zone and language for the room

CUSTOMIZE YOUR SMARTROOM

1 From the left menu, select Settings > Customization

2 Establish the look and feel of your Smart Room site through defining: Colors, Login Image / Logo, Customized Welcome Message (Dashboard Text)

REVIEW STATUSES

1 From the left menu, select Settings > Review Statuses

2 Use this option to customize review status "icons"

3 All saved icons become available for users to select during their document review process

4 Users can select status to be "Public to SRM" or "Private" (if unchecked).

5 Review Status is an option on Export Index Structure for the individual

6 SRMs can generate a report (Reports >Content Access>Review Status) to display review statues by user if marked public by the user.

CREATE INVITE TEMPLATES

1 From the left menu, select Settings > Invite Templates

2 Use this option to customize and save a user invite template with a subject, logo and message body

3 All saved templates become available to select when inviting a user, but there is also option to set a default.

INVITE USERS

1 From the left menu, select Users > Invite Users

2 Provide user details (name, email, company) and assign a Security Profile that corresponds with the required level of access and permissions

3 For inviting a large amount of users, the option to "Load CSV" simplifies this task:

   • Select "Download Example File."

   • Enter the user information and save as csv. Note – do not modify provided format.

   • Load .csv, review the user list, select "Next"

4 Next, choose an Invite Message Template using SmartRoom's default message, saved templates, or customize the message for this specific invite.

5 Select "Invite Users" to send the invite email to the user list. Invited Users will receive their own individual email invite with instructions to access the room.

ABOUT

1 From the left menu, select Settings > About Screens

2 Set this customizable text to describe your room or provide marketing content to your users per security profile. Enable this text to popup once or every time users login

SET UP SECURITY PROFILES

1. From the left menu, select Security Profiles > Add Security Profile

2. General settings include:

   • **Security Profile Name -** Used to identify each profile, which has unique access rights

   • **SmartRoom Manager -** "SRM" has full access to control and manage the SmartRoom, including security profiles, users, and all content management

   • **Viewing Options** - Allow you to override specific room level settings for this profile

   • **Top Level Folder -** Allows the security profile to have limited access based on a top level folder for this profile. Note – regardless of the given security rights, this profile will have limited effective access, based on the set top level folder.

   • **Content Stage -** Set up access to staged content for this specific profile. To set up all profiles, use Settings > Content Stages.

   • **Suspended** - This option disables the security profile and all users that are currently assigned to this profile

3. Document Modify Rights:

   Allows the security profile to have 'Modify' rights based on the right (s) enabled. Note: When applying the security rights to the profile you will need to include a right with the "modify" option against the folder (s) you want the profile to modify.

4. SmartLock:

   You can set a security profile to use the room-wide SmartLock settings (under Settings > Configuration > SmartLock) or set specific SmartLock settings for each security profile.

SETUP SECURITY RIGHTS

1 From the left menu, select Security Profiles > select a Security Profile > Lock icon (Security)

   • **Select Security** - Simple intuitive visuals are used to establish assigned access for the entire index

      Solid circle indicates 'no pass-down', which 'gives' access for this folder only)

      Arrow below circle indicates 'pass-down' to all subfolders/files

      Within this circle, 4 letters indicate access to: View, Modify, Print, Save.

      Red background under each letter indicates 'No Access', while Green indicates 'Access'

      Example 1: Indicates 'given' rights to View and Print, but NOT Save or Modify. These rights will NOT be passed down to subfolders or files.

      Example 2: Indicates 'inherited' rights from its parent folder.

   • "Given" rights are based on the user selected rights per content, while "Inherited" right provides the actual established rights based on additional security settings (e.g. top level folder)

INDEX FILTERING

1 From the left menu bar, select "Index Filtering"

2 Select a profile to impersonate and view the content structure as that profile can access it. Note – available menu actions are based on your SRM access, NOT the selected security profile.

CUSTOMIZE YOUR USER PROFILE 👤

1 From the upper right hand corner menu, select your user name. These features are:

- **Split View -** Splits the content view, providing a separate window to manage/move file content

- **Hide Files** (If Split View is disabled) - Hides the files from being displayed in the index view

- **Enable Drag -** Allows the ability to drag and drop content via the main content view or split view

- **User Profile -** View or update the following:

  - o User Details - Name, Company, Profile
  - o Password Update - Change your password
  - o Authentication - Set up 2 factor
  - o My Settings - Set Menu Style, Language, Auto-Snap Windows, Expand All and Show Numbers in Saved Folders/Files

IMPORT INDEX 🗒

1 From the left menu, select Content

2 Hover over folder menu and select hamburger icon > Additional Options > Import Index

3 Define your own multilevel list or use a pre-defined structure with "Insert Sample Structure."

VIEW INDEX STRUCTURE

1 Once you have logged in and selected a room, select "Content" from the left menu bar

2 The SmartRoom Index is displayed in the main content area on the right

MANAGE AND VIEW CONTENT

Depending on the user's access, several actions are available on selected content. Possible actions are:

Download Original File - Downloads the file to the local device based on browser settings

Refresh Folder - Gets latest available content

Create New Folder - Create a new subfolder under the selected folder

Properties - View detailed info about the content

Expand All - Expand all subfolders

Collapse All - Collapse all subfolders

View Files - Displays a list of files in a separate window, for multi-tasking and moving content.

Folder Structure - Displays folder structure in a separate window

Review Status - Users can select a "private" or "SRM Public" review status for a file

Favorites - Users can mark a folder or file as a "favorite" making the items accessible on their dashboard.

Additional Options - Use the 'hamburger' menu to access the following additional actions:

Search This Folder - Searches for matching words or terms in the selected folder or file

Rename Folder / File - Allows user with appropriate 'modify' rights to rename the selected content

MANAGE CONTENT: Advanced Options

Remove Folder / File - Remove the content from the main content structure. Removed contents will be sent to the recycle bin.

Create Document - Provides a simple, quick method to add a new office document. This feature requires Office365 setting to be enabled.

Set Top Level Folder - Set the selected folder as the ONLY parent folder (including all subfolders, files) that a profile can access

Upload New Version - Allows a new file version to be uploaded in place of existing one. This requires Document Versioning to be enabled.

View File Versions - Displays a list of all versions of a document which can be viewed or removed. This requires Document Versioning to be enabled.

Mark as Unread or Read - Depending on the individual User's previous activity against the document, will either change the document back to bold format to indicate it has not been read or will remove the bold format to indicate it has been read.

Export Index - This feature will export the entire structure to excel with key information: Name, Date Created, Size (KB), Page Count.

Import Index - Define your own multilevel list or use a pre-defined structure with "Insert Sample Structure."

DASHBOARD (summary)

1 From the left menu bar, select "Dashboard"

2 Several summary views are available: Most Recent Logins, Top Security Profile Logins, Most Recent Upload, Login Graph

3 Use filters on any view to change the date range or drill into detailed reports.

UPLOAD & MULTI-SELECT CONTENT

- **Upload Content** - From the left menu bar, select Content. Hover over folder menu and select action > Upload Content. Select "Browse for Files" to select file(s) from your local computer. From here, you can also override default security access and set up specific access per profile.

- **Drag and drop files** or folders from your local machine into the destination folder. This will then open the "Upload Content" window. Note - this feature is only available using Chrome.

- **Zip Uploader -** From the left menu bar, select Content. Hover over folder menu and select action > Zip Upload. This allows any user with upload rights to upload a single zip, and have the contents automatically extracted and uploaded in to the full folder/file structure.

- **Email Upload** - SRMs or users with upload rights can forward emails and leverage SmartRoom to store, share, and track document access. Once enabled, there is an online help section

- **Multi-Select Functionality** - To activate "Multi-Select" mode hover over content > select a checkbox. Use the "Action" buttons at the top to perform the following:

  o **Delete -** Transports the selected content to the Recycle Bin

  o **Move -** Moves the selected content from the current folder into the folder selected.

  o **Copy -** Copies the selected content to the location you select while also keeping the content in the original location.

  o **Download -** For those with "save" rights to the content will save the content to your local Downloads directory & in your Save Queue > Available Downloads.

  o **Add to Save Queue** - For those with "save" rights to the content, will add the content to the Save Queue > Current Queue

  o **Add to Print Queue** - For those with "print" rights to the content, will add the content to the Print Queue.

SAVE QUEUE

1 From the left menu bar, select "Content" Hover over folder or file menu and select action > Add to Save Queue

2 Once content is added, select "Save Queue" from the left menu to further select only the files you want to save or select "Finalize All."

- **This is the content** that becomes available for a bulk download to your local computer as zip file. Available downloads are then displayed in the 2nd tab. You will also receive an email once the zip has been processed and is ready for download.

PRINT QUEUE

1 From the left menu bar, select "Content" Hover over folder or file menu and select action > Save to Print Queue

2 Once content is added, select "Print Queue" on the left menu to check the status or pause the print job.
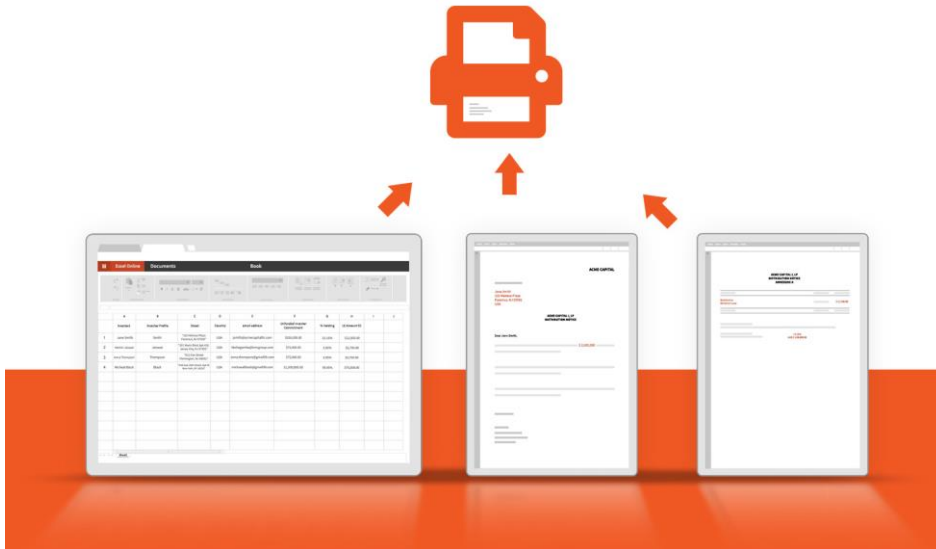
- **Note -** Bulk printing via the Print Queue requires a separate executable (SmartPrint.exe) to be installed.

SMARTSHARE

1 From the left menu bar, select "Content" Hover over folder or file menu and select action > Create SmartShare

2 Once content is shared, select "SmartShares" from left menu to view all shared content.

- **This feature allows** SRMs to share content externally with non-SmartRoom users while maintaining security and reporting. SmartShare is more secure than sending documents over email and allows the SRM to control access of the document by adding passwords and setting expiration dates.

SMART DRIVE

1 Download SmartDrive here: https://smartroom.com/smartdrive

2 Login using your SmartRoom credentials.
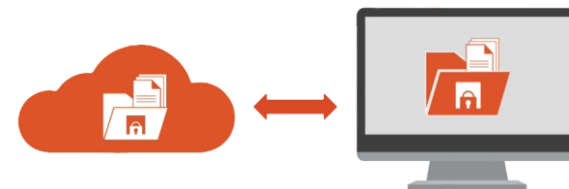
- **SmartDrive** is a desktop application that allows you to work with Smartroom content from the convenience of your desktop, while providing the features of SmartRoom's advanced security, content management and reporting functionality.

ALERTS ⚠

SmartRoom Managers can create 2 different types of email alerts to notify users on specific events. Such events are: new documents are uploaded, documents are deleted, folders/documents are viewed, or new versions of files are added.
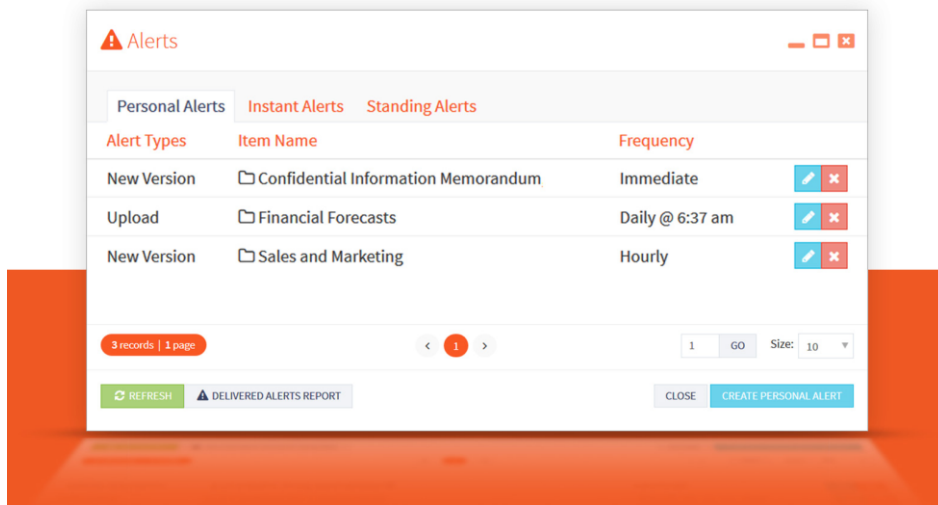
- **Standing Alerts -** Reoccurring alerts that are triggered by a specific action (i.e. upload) on the selected content. A Standing Alert will only be sent to Users or Security Profiles you specify and if they have access to the folder or file that is selected.

- **Instant Alerts -** A one-time email to specified users which allows the SmartRoom Manager to freely form a subject, message, and associated content

- **Personal Alerts -** Reoccurring alerts are also triggered by a specific action for the selected content. A Personal alert can only be personally managed (not set or distributed to others).

RECYCLE BIN 🗑

1 From the left menu, select "Recycle Bin"

2 From here, files that have been removed can be restored back to their original location and security privileges. Please note: Files deleted from the recycle bin cannot be restored

CONTENT STAGES ⬇

Content Stages allow a flexible additional layer of security access (called stages) to be set above the V/M/S/P rights of the security profile.

- **Settings > Configuration > Enable Staging** - Turn on staging for the room and the below settings become available

- **Settings > Content Stages -** Establish required stages and set up access to staged content for all security profiles. To grant access to specific stage(s) per security profile, click the corresponding box under the stage. If the box is green, the security profile has access to content that is set to this stage, while red indicates the security profile does NOT have access to content that is set to this stage.

- **Manage Content > Set Stage** - Set the required stage on content to restrict content access based on each security profile's content stage access. By default, a content's stage will be not applicable ("N/A") until it is specifically set.

REPORTING

1 From the left menu bar, select "Reports"

2 All reports offer the ability to save customized filters using "Report Settings"

3 Reports can be scheduled to be sent at a specific frequency and date/time using "Report Scheduling"

4 The Available reports broke out by section are:
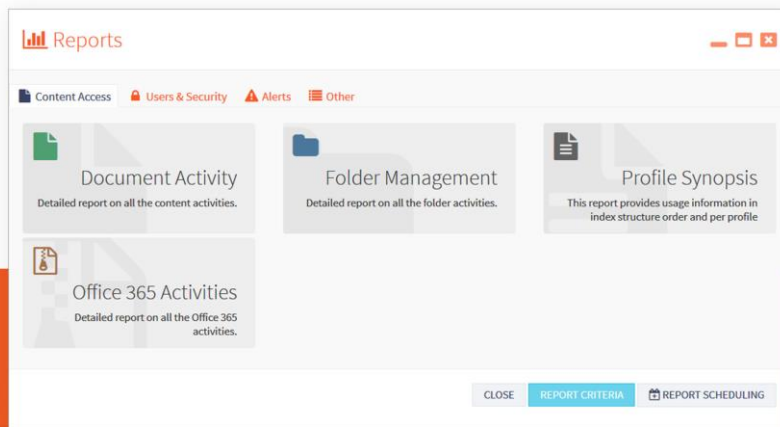
CONTENT ACCESS

- **Document Activity** – Provides a list of activity including: document name, activity type (view, upload, rename, delete), date/time, and user details
- **Folder Management** – Provides all folder content changes including name, activity types (add, delete, rename, move), date/time, and user details

- **Office 365 Activities** – Provides a detailed report on all the Office 365 activities
- **Review Status** – Provides in an index structure all statuses Users have marked "Public to SRM" on files.

PROFILE SYNOPSIS REPORTING

The available Profile Synopsis Reports are:

- **Profile Synopsis by Folder -** Includes summary counts of viewed/saved/printed content by top level folder
- **Profile Synopsis by Security Profile -** Provides a useful summary of various data points per security profile
- **Profile Synopsis by User -** Provides total count of documents accessed, viewed, printed, and saved PER user, total time connected per user, and total counts per security profile.
- **Profile Synopsis By Document -** Provides a summary of total documents on site, viewed vs. not viewed. The detailed view which can be downloaded via excel provides similar details (total documents, viewed vs. not viewed) for the entire index structure, and for each security profile.
- **Profile Synopsis by Document Accessed -** Provides additional metrics than the Profile Synopsis by Document report to include documents printed, saved and accessed.
- **Profile Synopsis by User Details -** Provides a separate tab per security profile and includes a summary section and detailed section (which can be downloaded via excel) indicating access per User in an index structure.
- **Document View Status -** Based on the filter settings you select, provides a report of all documents that have been viewed per User or all documents that have not been viewed per User.

REPORTING (continued)

From the upper right hand corner menu, select your user name. Those features are:

USERS & SECURITY

- **User Management** - Provides user details, date/time, and activity type (add, remove, edit)
- **Security** - Provides an overview of access rights per security profile
- **Security Profile Management** - Provides list of all security profile changes, including old and new values
- **Logins** - Includes details of every login to the room with the ability to filter by User, Security Profile, or Date Range.

ALERTS

- **Scheduled Alerts Report** - Provides a list of all scheduled personal or standing alerts that have been established in the room.
- **Delivered Alerts Report** - Provides a detailed report of all delivered personal, instant, or standing alerts
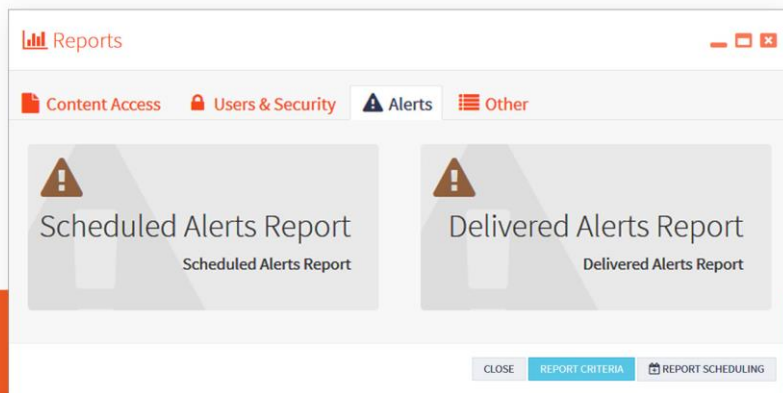

Q&A (if enabled)

- **Q&A Activity** - Provides a list of all Q&A activity that has taken place in the room.
- **Q&A Change History Report** - Provides a detailed report of every change related to Q&A activity

OTHER

- **Setting Management** - Provides list of all settings that have been changed, date/time, and old and new values
- **Access Agreements** - Provides a report of users and each time the access agreement was accepted
- **Search Summary** - Provides a summarized report of all search strings with total counts by profile
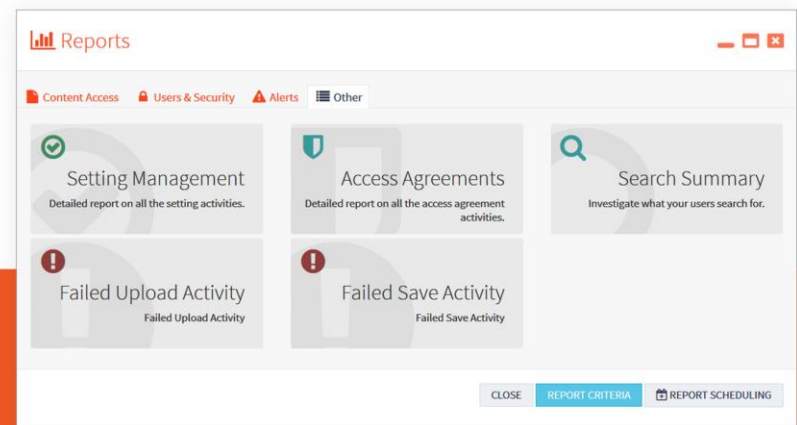
- **Failed Upload Activity** - Provides a list of all failed uploads. For SRMs this list will include all failed uploads by SRMs and Users with "upload" rights.
- **Failed Save Activity** - Provides a list of all failed saved activity. For SRMs this list will include all failed saved activity for all Users.

CONTACT US

Need Help? Please contact us.

Within SmartRoom: From left menu, select "Contact SmartRoom"

Email: SmartRoomManager@smartroom.com

Call: North America: +1.877.332.5739
Asia: +852.800.930.643
Europe: 00.800.3325.7666
Japan: 0120.974.858
India: 000.800.100.8914

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